

REDACTED

Project Director Services For the MMIS Implementation Project

**Technical Proposal
Request for Proposal MED-12-018**

August 17, 2011

William Larkin Consulting, LLC

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Tab 1 Transmittal Letter

3.2.1 Information to Include Behind Tab 1:

Transmittal Letter.

The transmittal letter serves as a cover letter for the Technical Proposal. It must consist of an executive summary that briefly reviews the strengths of the bidder and key features of its proposed approach to meet the requirements of this RFP.

The Transmittal Letter is on the following page.

August 16, 2011

Mary Tavegia
Issuing Officer
Iowa Department of Human Services
Iowa Medicaid Enterprise
100 Army Post Road
Des Moines, Iowa 50315

Dear Ms. Tavegia:

On behalf of William Larkin Consulting, LLC (WLC), I am pleased to present the State of Iowa with our response to the Request for Proposals (RFP) MED-11-018, Project Director Services for the MMIS Implementation Project.

William Larkin Consulting is a limited liability corporation incorporated in the State of Arizona. We are in process of registering to do business in the State of Iowa. I will serve as the primary contact for all RFP-related communications, including any requests for clarification or other communication needed between the IME staff and WLC. My contact information is as follows:

William Larkin
Managing Principal
William Larkin Consulting, LLC
14388 East Geronimo Road
Scottsdale, Arizona 85259
Email: billlark@gmail.com

P: 480-776-9996
F: 480-451-4319

As instructed, we have provided one (1) original and four (4) copies of the technical proposal with one (1) copy on CD-ROM. We are also including, packaged separately, one (1) original and four (4) copies of the cost proposal, with one (1) copy on CD-ROM.

WLC makes the following certifications and guarantees regarding this proposal:

- WLC will comply with all contract terms and conditions as indicated in this RFP.
- No attempt has been made or will be made by WLC to induce any other person or firm to submit or not to submit a proposal.
- WLC does not discriminate in its employment practices with regard to race, color, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or handicap.
- No cost or pricing information has been included in this letter or the Technical Proposal.
- WLC's proposal is predicated upon the RFP published on July 18, 2011.
- WLC certifies that the prices contained in this bid proposal have been arrived at independently, without consultation, communication, or agreement, as to any matter relating to such prices with any other bidder or with any competitor for the purpose of restricting competition; and, unless otherwise required by law, the prices quoted have not been knowingly disclosed by WLC prior to award, directly or indirectly, to any other bidder or to any competitor.
- WLC will be using a subcontractor in the provision of the services contained in this bid proposal.
- WLC acknowledges and accepts all term and conditions stated in the RFP.

We have been honored to be a part of the Iowa Medicaid Enterprise since its inception. The IME and the Iowa Medicaid Program are innovators and the potential for this business model will be further realized in the implementation of new

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application infrastructure that will have the adaptability and flexibility needed to manage the Medicaid program in the era of Health Care Reform.

Strengths of the Proposed Team

Bill Larkin has been in the forefront of health information technology with over 38 years of executive, project management, and program implementation skills. He is known for his innovation and practical application of new technology to improve managed care plans and government-funded health care programs, including Medicaid and Medicare. As a former Partner in Fox Systems and senior executive with two Medicaid operations contractors, he has over 30 years of progressive responsibility. He saw the need in the marketplace for a new kind of consulting company that is client-centric and focused on health information technology of the future, and he founded William Larkin Consulting in May 2010 to meet the needs of large, publicly funded health care organizations who need strategic direction and executive management of new HIT projects, including MMIS, Health Information Exchange, and Health Insurance Exchange.

In this proposal, WLC presents an expanded capability for Project Director Services for the Iowa MMIS Implementation Project. WLC presents two people to fulfill the requirements for Project Director. Bill Larkin is proposed as the Project Director, who is available on a full-time, but not dedicated basis. He is committed to this project because of his dedication to the spirit of the IME, and his long-time knowledge and understanding of the Iowa Medicaid Program, having worked with Iowa Medicaid since 1980. A review of his resume will substantiate that he is uniquely qualified to serve as the Project Director. In addition to Mr. Larkin, WLC also presents Brent Bizik, MBA, as the full-time onsite Deputy Project Director. Mr. Bizik is a highly skilled and experienced project manager, with an emphasis on operations. Most recently, he was the Chief Operating Officer of the Pima County Health System health plan for the AHCCCS program in Arizona. His prior experience has been in consulting and in health information exchange as a part of the AHCCCS Medicaid Transformation Grant. Mr. Larkin and Mr. Bizik have worked together on various projects since 2007.

WLC has chosen this expanded capability approach because of the need for redundancy and backup to ensure project leadership and continuity. In addition, we believe that the work effort is greater than what can be accomplished by a single individual. We also believe that a stronger Project Director capability will foster project communications and executive oversight and coverage of the many projects under way. Mr. Bizik will be dedicated 100% to the MMIS Implementation Project, and Mr. Larkin will commit to full-time presence for up to 75% of annual full-time engagement. This will enable Mr. Larkin to continue to honor previous commitments in Arkansas with the Arkansas Medicaid Enterprise and SHARE, the statewide HIE.

Key Features of the Proposed Approach

The proposed approach is based on the principles of openness and transparency that are hallmarks of the IME. WLC places a very high value structure on the free flow of information through defined channels of communication and accountability. The proposed Project Director is an established leader who gains respect through knowledge and experience combined with excellent communication and project management skills honed through countless MMIS projects.

WLC's proposed Project Director has worked closely with senior State staff in a wide range of roles, as state staff, as a contractor, as a consultant, and as a health plan subcontractor to the Medicare Program. He has developed and supported effective project governance structures, and he is most knowledgeable about MITA and MMIS requirements. The proposed Deputy Project Director has similar experience and brings tremendous knowledge and operational intelligence that will be a great asset in the management and coordination of contractors, contracted consultants, and limited state staff.

Selection of WLC will enable the Department to rely on the Project Director to improve on the approach to achieving the many simultaneous projects scheduled to be accomplished in the next three to five years. We would like to be a key part of this team.

WLC will carry out all contract responsibilities in the same highly professional and successful manner to which all our clients have become accustomed. Please contact me should you have any questions or need additional information.

Sincerely,

William Larkin
Managing Principal

Tab 2 Bidder's Approach to Meeting Deliverables

3.2.2 Information to Include Behind Tab 2: Bidder's Approach to Meeting Deliverables.

To address the bidder's approach to meeting the deliverables set forth in Section 1.3 of the RFP, the bidder shall submit no more than one page of text (1) explaining how the bidder will be able to meet all Deliverables set forth in the Scope of Work using a key person(s) assigned to the Contract and, (2) identifying any inability of the bidder or key person(s) to fully meet the Scope of Work requirements.

Note:

- *Bid Proposals shall identify any deviations from the requirements the bidder cannot satisfy.*
- *Bid Proposals shall not contain promotional or display materials unless specifically required.*

If a bidder proposes more than one method of meeting the RFP requirements, each method must be drafted and submitted as separate Bid Proposals. Each will be evaluated separately.

WLC has developed an approach that will ensure that we meet all the requirements in the scope of work without any exceptions or deviations. Our one page approach to meeting the project deliverables is on the following page.

Our approach is based on a project directorate structure that provides depth and redundancy while ensuring that dedicated staff is focused on keeping all of the components of the MMIS implementation in focus and coordinated with other DHS, State of Iowa and federal health care initiatives.

Leadership is best demonstrated in action and commitment to values that will lead to effective project management and success. WLC has a demonstrated track record of successful projects, attention to detail, and dedication to project objectives, including on time delivery and system accuracy.

WLC understands the importance of the role of the Project Director in the MMIS Project and the responsibilities of the Project Director to manage and lead the effort for the Department while the ongoing challenges of managing the Iowa Medicaid program and operating the Iowa Medicaid Enterprise continue at full speed. As Project Director, WLC will manage and coordinate the full array of support teams, consisting of both Department and contractor team members.

WLC will support the Executive Sponsors, in their roles as the Executive Steering Committee, by providing milestone reporting, risk management, and policy issues information to guide Department monitoring and decision-making.

Planning is the art of envisioning change and setting the course to get to a desired outcome.

WLC will provide planning support to keep the MMIS project in synch with other Medicaid program and health reform activities. WLC brings unparalleled knowledge and awareness of the big picture of HITECH, ARRA, CHIPRA, and ACA initiatives that are impacting all state Medicaid programs. WLC can support the Department in many ways through information sharing, impact assessment, and periodic briefings. WLC can support other project governance and procurement activities so that MMIS and IME interests are well represented.

Oversight and Management is the never ending process of learning about one's environment and directing others to take many small steps toward an achievable goal.

WLC views the Project Director as an Executive Office function that sits above the project management level of each project to actively manage on behalf of the Executive Sponsors. It requires people and management skills to act both proactively (planning, risk management) and reactively (issue management, change management) while keeping on top of the many details that arise daily and may be symptomatic or non-symptomatic, with the knowledge and understanding to classify and differentiate those that are most important or require escalation.

Communication is a uniquely human activity as one has to have something to say, and others must listen in order to receive the message and must think in order to understand the meaning.

The proposed Project Director has the interpersonal and presentation skills to be able to ensure that all stakeholders and project participants have the information needed, on a continuously day-to-day basis, and at measured intervals, as in periodic Executive Steering Committee meetings. WLC has unique skill and communications abilities; we will prepare and present concise regular status reports and monthly status reports in a format and with content that is familiar to each audience. We will also work with the other MMIS contractors to ensure that their status reporting formal communications are aligned and consistent.

Reporting Good status reporting does more than present the news; it must provide depth, perspective, and context in order for information to be actionable.

WLC will submit weekly status reports to the Iowa Medicaid Director and others on a weekly basis. WLC will provide a standardized template for approval that will be used as both a contemporary project journal and an activity monitor focused on accomplishments, planned accomplishments, and pertinent issues that need to be elevated in order to be effectively resolved.

Tab 3 Letter of Commitment of Key Personnel.

3.2.3 Information to Include Behind Tab 3: Letter of Commitment of Key Personnel.

Include the letter of commitment of the candidate being offered.

August, 14, 2011

Mr. William Larkin
Managing Principal
William Larkin Consulting, LLC
14388 East Geronimo Road
Scottsdale, Arizona 85259

Dear Mr. Larkin:

This is a letter of commitment by me to be bid as a member of our company's team to provide Project Director Services for the Iowa MMIS Project. I have read and I understand the requirements of RFP MED-12-018, in particular the scope of work on the project, as specified in RFP Section 1.3. My background and experience, as found in resume, establishes my qualifications for the services to be provided.

I am fully committed to this project, during the term specified in the RFP and I agree to be available on a full time basis to work on this project, subject to the finalization of the contract between William Larkin Consulting, LLC and the Iowa Department of Human Services.

I look forward to working in Des Moines on this project.

Sincerely,


William Larkin



August, 15, 2011

Mr. William Larkin
Managing Principal
William Larkin Consulting, LLC
14388 East Geronimo Road
Scottsdale, Arizona 85259

Dear Mr. Larkin

This is a letter of commitment by me to be bid as member of your company's team to provide Project Director Services for the Iowa MMIS Project. I have read and I understand the requirements of RFP MED-12-018, in particular the scope of work on the project, as specified in RFP Section 1.3. My background and experience, as found in resume, establishes my qualifications for the services to be provided.

I am fully committed to this project, during the term specified in the RFP and I agree to be available on a full time basis to work on this project, subject to the finalization of the contract that will follow the Teaming Agreement that we have executed for purposes of submitting a bid to the Iowa Department of Human Services.

I look forward to working with you in Des Moines on this project.

Sincerely,

A handwritten signature in blue ink that reads "Brent C. Bizik". The signature is fluid and cursive.

Brent C. Bizik, MBA
Cambiare, LLC

2402 East Cheryl Drive, Suite C Phoenix, Arizona 85028

Tab 4 Resume of Candidate(s) Being Offered

3.2.4 Information to Include Behind Tab 4: Resume of Candidate being offered.

The Bid Proposal must contain a resume of the individual being offered as a candidate to perform the scope of work set forth in Section 1.3.

WLC is presenting two exceptional candidates, William Larkin and Brent Bizik.

Qualification Summary

For each candidate we present a summary of the candidate's qualifications

William Larkin Qualifications

Key Personnel Requirement	WLC Candidate William Larkin
a. Project Management – knowledge of the principles and tools needed for the successful implementation of a large, complex project with a minimum of 5 years experience as a project manager in a large system or business implementation.	Mr. Larkin has over 30 years of MMIS system implementation experience, in Florida, Tennessee, Iowa, and Oregon. In addition, as the Vice President of Consulting at Fox Systems, he was client executive and oversaw the procurement and implementation of over 20 MMIS systems. In addition to his client facing duties, he managed the development of repeatable practices and oversaw Fox Systems growth until 2010..
b. Medicaid Experience – must have worked in a Medicaid environment for a minimum of 8 years with knowledge of how a Medicaid Management Information System (MMIS) works, how policy is developed, and how a Medicaid enterprise operates on a daily basis.	Mr. Larkin is a recognized authority all aspects of Medicaid Management Information Systems, with over 38 years of experience beginning with the first MMIS implementation in Ohio in 1973, and as a Project Manager with System Development Corporation (now Molina) in Iowa as the Operations Manager. He also has 13 years Project Manager experience with Consultec (now Xerox/ACS). As Partner at Fox Systems, he served as an MMIS thought leader and strategist. This is best represented by the work that FOX did in Iowa to assist in the development of the Iowa Medicaid Enterprise in 2004.
c. MITA Must be familiar with all concepts of the Medicaid Information Technology Architecture (MITA) and how it is applied to a Medicaid enterprise.	Mr. Larkin is an expert in Medicaid business process modeling. As the Fox Project Manager in Oregon, he development the conceptual business process model that was contributed by Oregon to the CMS MITA Project, and became the MITA business model. He also served as an executive contributor to MITA, and developed the FOX MITA practice, based on the Fox authored MITA 2.0 State Self Assessment.
d. Large Scale Projects Must have managed the resources for a large project including personnel and funds within the last 5 years.	Mr. Larkin had full profit and loss responsibility for all of Fox Systems Medicaid engagements, including procurement, quality assurance, IV&V, implementation assistance and HIPAA compliance assessment. In addition, from 2005 through 2007, he was founder and Chief Operating Officer for the Fox Insurance Company, a Medicare Prescription Drug Plan in 23 states, including Iowa.
e. Iowa Knowledge Must be familiar with Iowa's procurement and	Mr. Larkin has had almost continuous engagement with the Iowa Medicaid Program since 1980, when System Development

Key Personnel Requirement	WLC Candidate William Larkin
contract management policies and procedures.	Corporation took over the Title XIX Program from Iowa Blue Cross Blue Shield. Most recently, he directed the procurement efforts in the initial IME procurements in 2005, and was client executive for the IME Contract at Fox in 2008 until he left Fox in 2010.
f. Quality Management Must have a minimum of 5 years of quality management in a large, complex environment.	Mr. Larkin is very familiar with a full range of quality management processes and methods. He was responsible for the development of the FOX IV&V methodology, based on IEEE and PMI standards, and developed the checklist methodologies for deliverable review. Under his direction Fox developed a library of MMIS test cases and scenarios for testing. In addition, he was engaged in the executive team at Fox for both ISO9000 and CMMI (Level 2) certification.
g. Risk Management Ability to identify and differentiate the importance of issues and risks and escalate or resolve those of a critical nature in a timely manner.	Mr. Larkin was responsible for independent Risk Management for Noridian Administrative Services in the IME implementation in 2005. He did the risk identification, risk monitoring, and risk reporting directly to the Noridian Executive Vice President, and assisted them in their mitigation and corrective action efforts. Mr. Larkin has complete familiarity with issues management and working with large multi partner organizations to resolve issues and to escalate issues when needed for timely resolution.
h. Must have a minimum of 4 years experience in contract or vendor management.	As a contractor, and as a consultant to Medicaid agencies, Mr. Larkin has over 25 years of experience in contract and vendor management, and is fully familiar with fixed price, time and materials and award fee contracts. He has been responsible for contracts in all stages of the contract lifecycle, and has worked with states to develop contract requirements, terms and conditions and performance based contracts.
i. Ability to develop strong collaborative relationships across a multi-layered organization.	Mr. Larkin is respected for his insight, ability to listen, and ability to understand other organizations from the perspective of their point of view. He has been engaged in many multi organization committees and workgroup, mostly recently in Health Information Exchange development efforts in three states.
j. Ability to facilitate a positive culture that supports Agency goals, promote individual and team initiative, and foster open communication through all levels of the organization.	Mr. Larkin's previous experience in Iowa demonstrates his ability to support culture and environment that encourages individuals and organizations to rise to the occasion and to perform at the highest level of ability.
k. Must possess outstanding interpersonal and conflict resolution skills.	Mr. Larkin is a skilled communicator with excellent people skills and problem solving skills, developed through deep business and technical knowledge that aids in his ability grasp and resolve business conflicts.
l. Ability to prioritize, meet deadlines, and excel in a fast paced work environment.	Mr. Larkin has always worked in this type of environment across a multitude of successful Medicaid and MMIS projects.

Brent Bizik Qualifications

Key Personnel Requirement	WLC Candidate Brent Bizik
<p>a. Project Management – knowledge of the principles and tools needed for the successful implementation of a large, complex project with a minimum of 5 years experience as a project manager in a large system or business implementation.</p>	<p>Mr. Bizik has over 9 years of successful project management experience, with 5.5 years of experience managing projects in a large system or business implementation. Through this experience, he has gained in-depth knowledge of the principles and tools needed for the successful implementation of large, complex projects. His project management experience includes his work at the following:</p> <ul style="list-style-type: none"> • Cambiare, LLC=1 years • AHCCCS/AMIE=2 years • TriWest Healthcare Alliance=1 year • Direct Alliance Corporation=2 years • Ernst & Young Consulting=1 year • Southern Arizona Mental Health=2 years <p>Mr. Bizik has a thorough understanding of the principles and tools necessary for successful implementation of large, complex projects. He utilizes the principles of the Project Management Book of Knowledge, Fourth Edition (PMBOK) as the basis for his project management methodology. Additionally, he is an expert in all Microsoft Suite Tools (including MS Excel, MS PowerPoint, MS Word, and MS Project) and the utilization of enterprise project tools, such as MS SharePoint and Borland requirements management tool.</p>
<p>b. Medicaid Experience – must have worked in a Medicaid environment for a minimum of 8 years with knowledge of how a Medicaid Management Information System (MMIS) works, how policy is developed, and how a Medicaid enterprise operates on a daily basis.</p>	<p>Mr. Bizik has worked in a Medicaid environment for 9 years:</p> <ul style="list-style-type: none"> • AHCCCS/AMIE = 4 years • Pima Health Systems (PHS), AHCCCS Medicaid Health Plan = 1 year • Southern Arizona Mental Health = 4 years <p>This experience has given him an in-depth knowledge of Medicaid policy, operations, and MMIS. His MMIS work includes improving and mapping the processes around eligibility, prior authorization, and claims processing; improving processing performance and reporting of claims pends and denials and encounter pends and denials; and managing Medicaid/MMIS projects.</p>
<p>c. MITA Must be familiar with all concepts of the Medicaid Information Technology Architecture (MITA) and how it is applied to a Medicaid enterprise.</p>	<p>Mr. Bizik's work with Medicaid has enabled him to become familiar with and knowledgeable about MITA. Specifically, his responsibilities at AHCCCS and AMIE required him to perform reviews of MITA assessments and plan strategically for AMIE integration with AHCCCS MITA initiatives.</p>
<p>d. Large Scale Projects Must have managed the resources for a large project including personnel and funds within the last 5 years.</p>	<p>Mr. Bizik has managed financial and personnel resources for several large projects for 7 years at the following organizations:</p> <ul style="list-style-type: none"> • Western Pennsylvania (WPA), Regional Health Information Exchange and Health Information Organization=1 • AHCCCS/AMIE=4 years • Pima Health Systems (PHS), AHCCCS Medicaid Health Plan=1 year • Direct Alliance Corporation (eBay Program)=1year

Key Personnel Requirement	WLC Candidate Brent Bizik
	Mr. Bizik is an effective leader and excellent motivator manager with experience administering and acting as a conscientious steward of public and private project funds.
e. Iowa Knowledge Must be familiar with Iowa's procurement and contract management policies and procedures.	Mr. Bizik has significant experience and familiarity with state government procurement and contract management policies and procedures. He has worked on teams that developed, evaluated, and awarded state contracts in close collaboration with state procurement officers. He also has served as a SME on a bidder's conference panel for state contracts, responded to government RFPs, and understands the technical nature required to ensure fair selection of vendors.
f. Quality Management Must have a minimum of 5 years of quality management in a large, complex environment.	Mr. Bizik has 6 years of quality management experience in a large, complex environment. His quality management experience spans both clinical and technological environments and includes experience managing ongoing quality patient care for Medicaid members as well as managing technical solutions developed to create and map business and functional requirements that measure quality to improve clinical outcomes. <ul style="list-style-type: none"> • AHCCCS/AMIE=4 years • Southern Arizona Mental Health=2 years
g. Risk Management Ability to identify and differentiate the importance of issues and risks and escalate or resolve those of a critical nature in a timely manner.	Mr. Bizik has a track record of being a successful manager who is able to identify and analyze project risks and to resolve project issues in a timely manner. His management and leadership style relies on an intuitive understanding of the importance of mission-critical tasks within a project and his ability to work collaboratively to resolve and, as a last resort, escalate issues to steering committees or client management.
h. Must have a minimum of 4 years experience in contract or vendor management.	Mr. Bizik has 7 years experience managing contracts and vendors on the following projects and for the following organizations: <ul style="list-style-type: none"> • AHCCCS/AMIE/PACeHR=4 years • Pima Health Systems (PHS), AHCCCS Medicaid Health Plan=1 year • Southern Arizona Mental Health=2 years His health care project management experience includes defining contract goals, reconciling contract requirements with government statutes, supporting vendor negotiation and consensus development, ongoing contractor management, monitoring vendor contractual adherence, communicating expectations at multiple levels within organizations, and contract closeout/deliverable review and signoff.
i. Ability to develop strong collaborative relationships across a multi-layered organization.	Mr. Bizik has an exceptional, sought-after ability to develop strong collaborative relationships across a multi-layered organization. He strives to develop collegial, cooperative relationships within and across projects and organizations. Mr. Bizik believes that building strong relationships on a foundation of trust, mutual respect, and honesty not only creates a "team" environment, but also leads to a superb product.

Key Personnel Requirement	WLC Candidate Brent Bizik
j. Ability to facilitate a positive culture that supports Agency goals, promote individual and team initiative, and foster open communication through all levels of the organization.	Mr. Bizik has an outstanding ability to facilitate a positive culture that supports organizational goals, promotes individual and team initiatives, and fosters open communication throughout all levels of an organization. His excellent interpersonal skills, conflict resolution skills, team building skills, and leadership approach enable him to facilitate a positive work environment where employees thrive, are dedicated, and create a superior work product. His abilities as a leader to foster a team environment have allowed him to hire and retain government employees who are offered higher salaried positions in the private sector. Mr. Bizik's managerial approach promotes open communication among internal and external stakeholders and across multi-layered organizational departments. He has been recognized for his exceptional communication skills, leadership abilities, fairness, employee accountability, and team building and he has received top honors for manager in his division.
k. Must possess outstanding interpersonal and conflict resolution skills.	Mr. Bizik has outstanding, publically recognized interpersonal and conflict resolution skills. His approach to conflict resolution is to address any issues quickly, honestly, fairly, and head on. This approach enables teamwork founded on principles of mutual respect, open communication, and collegial support. A positive culture allows for fewer conflicts, and if conflicts do occur, a positive culture allows for fair and quick conflict resolution. Please refer to Questions 1i and 1j for information regarding Mr. Bizik's interpersonal skills.
l. Ability to prioritize, meet deadlines, and excel in a fast paced work environment.	Mr. Bizik has a proven track record of project management success and an exceptional ability to manage projects by analyzing and prioritizing tasks to meet or exceed deadlines. He excels and thrives working in fast-paced environments that require focused project management and organizational skills.

Resumes

William Larkin Project Director

Overview

Mr. Larkin is a Managing Principal at William Larkin Consulting, LLC and has extensive experience as a Client Executive, Senior Project Manager, and Business Analyst on the design, development, and implementation of large Medicaid Management Information Systems (MMIS), Health Information Exchange (HIE), and other healthcare information systems over the last 38 years.

As a Partner/Vice President at FOX, Mr. Larkin was responsible for all Medicaid consulting projects, including business development and service delivery. He led the development of the Fox project management office and the repeatable processes that define the FOX project management and quality assurance methodologies. Mr. Larkin is recognized as one of the experts in Medicaid strategic planning, and has assisted a number of states in executive strategy, goal setting, and change management, including Arkansas and Iowa.

Mr. Larkin served as Client Executive for the Iowa Medicaid Enterprise systems and professional services project. He also served as the Project Lead to assist the state of Arkansas in the development of the grant application to the Office of the National Coordinator (ONC) for the statewide Arkansas health information exchange, now named SHARE. He has served as Client Executive for some of the largest and most challenging health care IT projects, including the Arizona Medical Information Exchange, the Medi-Cal MMIS/FI Procurement, and the Tennessee and Florida MMIS implementations.

Concurrent with his responsibilities at FOX, he was founder and Chief Operating Officer for the Fox Insurance Company, an AZ licensed health care insurer who operated a Medicare Prescription Drug Program in 23 states, including Iowa, prior to being sold in 2007. Before joining FOX, Mr. Larkin was President of HealthNet Data Link, a firm developing and offering Web-based system applications to health care providers and insurers, including a pioneering health insurance exchange.

Employment Summary

Organization	Position	Dates
William Larkin Consulting, LLC	Managing Principal	2010 - Present
FOX Systems, Inc.	Vice President	2000 - 2010
HealthNet Data Link, Inc.	President	1998 – 2000
Consultec, Inc.	Director, Business Development	1993 – 1998
Consultec, Inc.	Special Projects Manager	1990 – 1993
Consultec, Inc.	Operations Manager	1988 – 1990
Consultec, Inc.	Account Manager	1985 – 1988
System Development Corporation	Project Manager	1982 – 1985
System Development Corporation	Claims Operations/Provider Relations Manager	1980 – 1981
Independent Consultant	IT Consultant	1979 – 1980
Ohio Department of Public Welfare	Management Consultant	1973 - 1979

Key Qualifications

- Subject Matter Expert in strategic planning, business modeling, and health information technology
- Expertise in project management, quality assurance, and IV&V
- In-depth knowledge of all aspects of Medicaid programs and systems, including MITA
- Design, development, and implementation of MMIS in Ohio, Florida, Oregon, Tennessee, and Iowa
- Expert in Medicaid eligibility systems and Medicaid system information exchange
- Development of automated forms of eligibility verification and authentication
- Testing, installation, and operation of a large claims processing, Electronic Data Interchange (EDI), pharmacy Point of Sale (POS) systems for the States of Florida, Missouri, Tennessee, and West Virginia

Relevant Experience

Arkansas Division of Medical Services

Senior Consultant responsible for the development of the strategic planning to define and develop the Arkansas Medicaid Enterprise, a new business model for managing the Arkansas Medicaid Program. Advised the Medicaid Director and worked with the Fox Project Team to take the strategic concepts.

Arkansas Office Of Health Information Technology

Strategic Consultant to the Arkansas HIT Coordinator, assisted with the development of the statewide Health information Exchange (HIE) strategic plan. Had lead responsibility for defining the strategy to work with the state Medicaid program to align HIE and Medicaid maximization of HIE. Provided planning and technical consulting for business and technical operations planning to the Arkansas Center for Health Care Improvement (ACHI).

Western Pennsylvania (WPA)—Regional Health Information Exchange and Health Information Organization

Strategic Consultant to a 34 hospital organization and assisted in creating a strategic plan to develop a regional Health Information Exchange. Project responsibilities included:

- Conducting environmental scan and technical systems capability analysis
- Developing Use Cases and Priority Sequencing Recommendations
- Evaluating HIE models for recommendation
- Developing and presenting a Technical Recommendation to Support Financial Analysis

Tennessee Bureau of TennCare

Client Executive for the FOX team that provided requirements definitions, procurement, and Independent Verification & Validation (IV&V) support for the new TCMIS managed care system and data warehouse/Decision Support System (DSS). Oversaw Joint Application Design sessions, requirements documentation, and RFP and procurement support, and served as Client Executive for the FOX IV&V team that is helped the state implement the new TCMIS.

Iowa Department of Human Services

Client Executive for the FOX Team that provided procurement support services to Iowa DHS for several Iowa Medicaid contracts, including the State's Medicaid Management Information System (MMIS) contract. The project included a review of operational policies and procedures, technical analysis of the current MMIS, MMIS requirements analysis, and development, development of a technical approach to HIPAA compliance, and writing of the Request for Proposal (RFP) document. Additional tasks included preparation of an Implementation Advanced Planning Document (IAPD), bidder's conference support, bidder proposal evaluation training and technical assistance, and contract negotiation support. During implementation, Client Executive to Noridian Administrative Services, Core MMIS vendor, provided key staff augmentation and risk management services.

State of Oregon, Department of Human Services (DHS)

Served as Account Manager, responsible for leading a team of FOX consultants to provide DHS and the Office of Medical Assistance Programs (OMAP) with an MMIS that meets all state and Federal Medicaid and certification requirements, including applicable HIPAA regulations, and meets all current OMAP MMIS functional and business requirements.

Project responsibilities included:

- Successfully leading data gathering and analysis and proposed solutions to the large number of pended and denied encounters that previously placed the health plan on a Corrective Action Plan (CAP) by AHCCCS
- Supporting timely claims and encounter submission to AHCCCS
- Developing internal policies and procedures, including audit best practices
- Performing as a Health Information Technology SME for client IT executive leadership

Other Project Experience

- Headed the development of requirements analysis and design documents for a statewide Medicaid Management Information System program for the State of Ohio. As Project Manager, headed a team of over 15 technical staff to complete a \$10 million project in a timely and cost-effective manner.
- For the State of Florida, headed the requirements analysis and development project to design, develop, and install Consultec's Pharmacy Point-of-Sales Claims Adjudication Systems. This system has now been adopted by Consultec's PBM services that provide pharmacy benefits to all of Consultec's Medicaid states including Florida, West Virginia, Montana, Wyoming, Washington, New Mexico, and Colorado.
- Headed the effort for development of an interface between the Florida Medicaid system and the State Eligibility Determination and Client Management System (FLORIDA) that was developed by EDS. This effort included conducting a requirements analysis, developing an Advance Planning Document (APD), and obtaining Health Care Financing Administration (HCFA) approval for the multimillion-dollar change order.
- Consultec's PBM services also use this system to manage prescription benefits for a dozen other commercial and managed care clients.
- Managed the team that developed the Florida magnetic stripe plastic Medicaid ID card. Coordinated a full requirements analysis, developed an APD, and obtained Health Care Financing Administration (HCFA) approval before implementation of the plastic card for Florida's two million Medicaid recipients.
- As Project Manager to implement Medicare Part B systems, implemented the Medicare Part B claims system and managed the claims operations for the State of Louisiana.

- As part of the team at System Development Corporation (SDC), participated in the requirements analysis, logical design, physical design, development, and implementation of the Medicare Part B system for the State of Louisiana.
- As part of the team at Consultec, designed, developed, and implemented an advanced MMIS for the State of Ohio.
- Experienced in developing and implementing Electronic Data Interchange (EDI) product lines. This experience is extremely valuable in understanding and overseeing the implementation of HIPAA in any healthcare environment, in particular Medicaid and Managed Care. These EDI products were implemented for clients such as PCA Family Health Plans (HealthLink), Wellcare, Tennessee Managed Care Network, and Vanderbilt Health Plan.
- Contracted with numerous clients to provide technical assistance in developing Medicaid systems and billing requirements as an Independent Consultant. Clients included Ohio Hospital Association, SysteMetrics (now Thomson Reuters), Michigan Department of Social Services, and System Development Corporation.

Education

- BA, History, Ohio State University, Columbus, Ohio
- Graduate Studies, City and Regional Planning 1973-1974

Professional Organizations

- Medicaid Private Sector Technical Advisory Group Arizona Health-e Connection, Member
- Arizona Health e Connection (Arizona REC)

References

Reference 1

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Reference 3

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Brent C. Bizik, MBA

Deputy Project Director

Overview

Successful health care leader with an M.B.A. in Health Care Management and extensive project management experience overseeing, planning, implementing, and managing complex information technology (IT) projects. Known for organizational leadership skills and proven ability to successfully manage and coordinate projects, think strategically, provide expert employee motivation, utilize analytical thinking and excellent interpersonal/listening skills to work collaboratively with stakeholders, gain consensus, and build teams to deliver world-class solutions in regular, crisis management, and high-pressure situations.

Employment Summary

Organization	Position	Dates
Cambiare, LLC	Founder and Principal Chief Operating Officer Chief Financial Officer	2010-Present
Arizona Health Care Cost Containment System (AHCCCS)— Arizona's State Medicaid Program	Manager, EHR Systems and Services/Associate Director of the EHR Collaborative Purchase Program Health Information Exchange (HIE) and Electronic Health Record (EHR) Project Team Division Manager, IT Operations	2005-2009
TriWest Healthcare Alliance	Senior Project Manager, Quality and Process Improvement (Internal Consulting)	2004-2005
Direct Alliance Corporation	Operations Manager for Client that is a Fortune 100 Technology Company	2003-2004
Ernst and Young (Cap Gemini Ernst & Young) Consulting	Health/Managed Care Consultant	2000-2001
Southern Arizona Mental Health	Director of Operations	1997-2000

Key Qualifications

- Extensive health care IT project management experience
- Expertise in managing IT projects and creating and implementing health technology solutions
- Leadership roles within Arizona's Medicaid Program, Arizona Health Care Cost Containment System (AHCCCS)
- Experience serving as a Medicaid health plan interim Chief Operating Officer (COO), overseeing complex health care IT transition projects, including the management of third-party (vendor) IT transition teams
- Thrive working in fast-paced environments and expertise prioritizing and communicating conflicting needs to meet tight deadlines
- Intuitive understanding of the importance of mission-critical tasks within a project and ability to work collaboratively to resolve and, as a last resort, escalate issues to steering committees or client management
- Experience serving as business lead and working effectively as team leader to logically approach complex issues across multiple teams
- Excellent interpersonal skills, conflict resolution skills, and team building skills that facilitate a positive culture and foster open communication among internal and external stakeholders and across multi-layered organizational departments
- Expert in all Microsoft Suite Tools (including MS Excel, MS PowerPoint, MS Word, and MS Project) and the utilization of enterprise project tools, such as MS SharePoint and Borland requirements management tool

Relevant Experience

Cambiare, LLC

Relevant Key Requirements: Project Management, Financial and Personnel Management, Medicaid/MMIS/MTA Experience, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

Co-founded and manage a nation-wide health care consulting firm specializing in health technology solutions, IT project management, Medicaid health plan interim executive management, and strategic consulting. Oversee successful delivery of client solutions utilizing executive leadership skills and expertise in IT project management. Adept at identifying and linking business requirements to technology solutions, managing operations, and developing effective, cross-functional project teams.

Start Up Health Care Technology Company

Relevant Key Requirements: Project Management, Project Risk Analysis, Relationship Building

Serving as project manager for multifaceted group of interested parties looking to collaborate and build a health care technology start-up company. Leadership responsibilities include:

- Directing project management activities, including creation of project goals, timelines, and project plan and holding individuals accountable
- Establishing effective group progress touchpoints and communication lines across multiple entities
- Analyzing risks/issues and suggesting associated mitigating factors/resolutions for projects

Pima Health Plan (PHS)—Medicaid Health Plan

Relevant Key Requirements: Project Management, Financial and Personnel Management, Medicaid/MMIS/MTA Experience, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

Served as Interim COO of an AHCCCS Medicaid Health Plan during the transition of their multiple lines of business (ALTCS and Acute programs). Leadership responsibilities included:

- Managing multiple cross-functional IT project teams responsible for data application and hardware transition
- Implementing, facilitating, and directing cross-functional internal and external project team communication effectively utilizing daily IT and Finance touchpoint "Scrum" sessions and weekly executive briefings
- Listening to cross-functional Subject matter Experts (SMEs), analyzing solutions, presenting risk/benefit/recommendation analysis to executives, and building consensus for "go-forward" plan
- Successfully transitioning provider and member operations to third-party management company for health plan lines of business in condensed timeframe
- Overseeing daily operations of health plan during transition
- Serving as key resource for planning, identifying, managing, and resolving operational issues
- Monitoring vendor contractual adherence
- Coordinating regulatory oversight and reporting
- Successfully leading data gathering and analysis and proposed solutions to the large number of pended and denied encounters that previously placed the health plan on a Corrective Action Plan (CAP) by AHCCCS
- Supporting timely claims and encounter submission to AHCCCS
- Developing internal policies and procedures, including audit best practices
- Performing as a Health Information Technology SME for client IT executive leadership

AMIE Non-Profit

Relevant Key Requirements: Project Management, Financial Management, Contract Management, Project Risk Analysis, Relationship Building, Team Building

Provided executive leadership responsibilities and oversaw financial and governance progress for AMIE's planned merger with another non-profit health information organization (HIO). Project management experience included:

- Providing business leadership during client transition from government entity to non-profit
- Directing financial aspects of client transition and operations strategy for client merger
- Developing client financial policies and procedures, including the mechanism for payment from physician members, for startup non-profit
- Collaborating with stakeholders, including AHCCCS health plans, to gather and interpret their necessary health information exchange requirements so that high integrity data could be utilized by the Medicaid health plans to increase the quality of care and operational efficiencies
- Collaborating with additional stakeholders, including providers whose patient mix was heavily weighted with Medicaid members and who were planning strategies to receive ARRA funding under the HITECH Act

Western Pennsylvania (WPA)—Regional Health Information Exchange and Health Information Organization

Relevant Key Requirements: Project Management, Financial Management, Procurement and Contract Management, Project Risk Analysis, Relationship Building, Team Building

Served as a Strategic Consultant to a 34 hospital organization and assisted in creating a strategic plan to develop a regional Health Information Exchange. Project responsibilities included:

- Creating collaborative IT and operations workgroups
- Serving as the primary communication conduit between multidisciplinary business and technology teams
- Communicating with and managing potential IT solution vendors
- Performing as a Health Information Exchange (HIE) SME for stakeholder C-level executives
- Architecting and developing a financial pro-forma forecasting tool used for financial modeling based on various scenarios
- Forecasting revenue needs for ongoing HIO sustainability
- Projecting HIO expenses throughout entire organizational life cycle
- Providing executive client status reports, presentations, and recommendations for business aspects of the HIE and HIO formation

Arizona Medical Information Exchange (AMIE)

Relevant Key Requirements: Project Management, Financial and Personnel Management, Medicaid/MMIS/MITA Experience, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

In 2007, CMS awarded Arizona's Medicaid Program (AHCCCS) with its largest single-project Medicaid Transformation Grant for the state's first operational HIE. The Arizona Health Information Exchange (AMIE) was launched in September 2008. On this project, I was responsible for directing AMIE's business analysis team, which was tasked with creating requirements to provide high integrity data for Medicaid member care as well as reviewing MITA assessments to strategically plan AMIE integration with MITA initiatives, reviewing data reports for accuracy, and monitoring system integrity among Medicaid care providers. Additionally, I was responsible for interpreting and analyzing Medicaid operational data to prepare meaningful management reports to the executive steering committee. As operations manager, I created operational policies and procedures based on Medicaid Transformation Grant requirements, as well as on state and federal law research. My role in this experimental pilot included creating and evaluating/scoring responses which led to the award of Request for Proposals (RFPs). The successful outcomes of developing, implementing, and refining this groundbreaking project led to research that improves health delivery systems for Medicaid members. Additionally, on this project my responsibilities included:

- Performing as executive team member responsible for managing large, complex, and cutting-edge IT development and implementation project within aggressive timelines and grant-funded budget
- Directing multiple project teams and resources that interfaced business, users, development, testing, implementation, oversight, and community stakeholders and teams
- Serving as project director and manager for the business analysis team, which included developing business and functional requirements for the HIE viewer and administrative tools, creating specifications for utilization and audit reports, and serving as lead business representative between users and the development team
- Directing the operations and user support team and managing multiple projects, which included developing and managing the HIE operations policies and procedures, audit policies and procedures, and 24/7/365 user support plan, as well as interfacing with HIE data providers for ad-hoc report requirements and delivery

- Directing the user training team, which included developing and managing the user provisioning process and associated viewer account management form, developing training material, and utilizing multiple forms of media to train the users
- Directing the provider relations team, which included managing the communications between AMIE and the user community and creating and updating web site content areas aimed at effectively communicating the availability of tools to assist physicians and other health care providers with the HIE
- Directing and managing Work Breakdown Structure (WBS), timeline, and deliverables for multiple project teams
- Serving as a member of the National Association of Medicaid Directors (NASMD) Electronic Health Information Work Group
- Serving as SME for Health Information Organization Systems Work Group use case crosswalk with Health Care Information Technology Standards (HITSP)
- Leading business operations for AMIE, which included performance and audit analysis and reporting and communication with stakeholders (internal and external), including Medicaid health plans, health care providers, and the Medicaid steering committee

**Arizona Purchasing & Assistance Collaborative for Electronic Health Records (PACeHR)
Relevant Key Requirements: Project Management, Financial Management, Medicaid/MMIS/MITA Experience, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building**

The Purchasing & Assistance Collaborative for Electronic Health Records (PACeHR) was created as a "one-stop shop" to accelerate EHR adoption in small- and medium-sized physician practices. On this project, I worked with managing expectations and contracting for vendors.

Additional responsibilities included:

- Serving as PACeHR business manager and budget officer
- Developing the PACeHR financial policies and procedures, including the mechanism for payment from the physician members
- Developing and administering the PACeHR accounting infrastructure, including processes and forms
- Serving as a member of the EHR Vendor Evaluation team
- Creating the requirements for online user forms, content, and back-end analytics/reporting tools
- Participating in the Arizona Regional Extension Center (REC) application as part of the Health and Human Services HITECH Priority Grants Program
- Participating in state-wide community vendor planning and evaluation meetings to develop and enhance local and regional HIT adoption

Arizona Health Care Cost Containment System (AHCCCS)

Relevant Key Requirements: Project Management, Financial and Personnel Management, Medicaid/MMIS/MITA Experience, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

The Arizona Health Care Cost Containment System (AHCCCS) is Arizona's Medicaid Program. In this role, I managed division-wide process improvement projects, including dual eligible fee-for-service claims processing to maximize Medicaid member benefits and achieve operational care delivery excellence. I developed automated reporting to efficiently prepare and effectively analyze health care data to increase patient care and improve Medicaid member care outcomes. I also planned, created, implemented, and managed appropriate policies and procedures to improve the health care delivery systems for Indian Health Services (IHS)/Medicaid enrollees. Additionally, I served on and provided senior-level leadership to the division steering committee to assess, implement, and manage division-wide efficiency and IT projects,

including reviews of MITA assessments, and I developed and implemented two Web-based tools for providers in cooperation with IT. In my position, I was recognized for my exceptional communication skills, ability to quickly “get things done,” leadership, fairness, employee accountability, and team building and I received top honors for manager in my division. I further served the Arizona Medicaid population by:

- Managing all aspects (including hiring, strategic planning, budget, and operations) of the clinical prior authorization team, transportation authorization team, utilization review team, and administrative support team
- Reducing a vendor contract by a significant dollar amount through business process redesign
- Designing and utilizing automated reports to measure staff effectiveness and efficiency
- Fostering a collegial and cooperative environment within my division and across other divisions
- Serving as project manager (key leader through entire project life cycle, including requirements, development, testing, implementation, and performance measure reporting and metrics) and working with clinical SMEs, community users, IT developers, and testing departments to create the first AHCCCS prior authorization status portal
 - Creating open lines of communication with AHCCCS executives and community users regarding project risk, solution, and status
- Serving as project manager (key leader through entire project life cycle, including requirements, customization, testing, implementation, and performance measure reporting and metrics) and working with clinical SMEs, community users, software engineers, and testing departments to implement AHCCCS prior authorization ACD and IVR phone system
 - Creating open lines of communication with AHCCCS executives and community users regarding project risk, solution, and status

TriWest Healthcare Alliance

Relevant Key Requirements: Project Management, Personnel Management, Project Risk Analysis, Relationship Building, Team Building

TriWest is the 16th largest Department of Defense (DoD) contractor in the United States and contracts with the DoD to administer TRICARE in the 21-state West Region. In my role at TriWest Healthcare, my responsibilities included:

- Managing customer service/customer relations, IT, and quality and process improvement projects
- Developing and implementing operational audit processes and review tools
- Serving as a SME on IT call center process analysis, improvement, and operational reporting projects for multi-state call centers
- Executing monthly balanced scorecard and performance metrics evaluation
- Communicating with multiple operations and internal PMO stakeholders to promote teamwork and a positive flow of information
- Gathering data, developing health plan profile of member beneficiaries to improve service delivery, and presenting this data to executives
- Creating open communications and submitting weekly status reports for projects I managed

Direct Alliance Corporation

Relevant Key Requirements: Project Management, Financial and Personnel Management, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

Direct Alliance Corporation is a high-tech Business Process Outsourcing (BPO) company that provides Fortune 500 and Fortune 100 companies with management of the complete order fulfillment lifecycle. In my position as operations manager, I was responsible for the team tasked

with 24/7/365 seamless customer experience and operations that included management of logistics, call center, order fulfillment, regulatory compliance, and program IT and process improvement projects. Additionally, I was responsible for the business plan creation, client sales pitch, program launch, and ongoing program management (including P/L) of the first online “B-stock” sales on eBay. Due to the tight timeframes (operational 24/7/365) inherent in this job, I worked efficiently and became known for logically and expeditiously gathering data (listening to various SMEs), analyzing information, implementing solution development and risk mitigation strategies, employing solution consensus building, developing project plans for issue resolution, and successfully implementing solutions in a calm, communicative, collaborative, intelligent, and efficient manner. My project management responsibilities included:

- Leading the software requirements development, implementation, and testing to handle multiple state tax free holidays compliance
- Developing the business and project plan, creating consensus and selling the program to the client, implementing fulfillment and other IT transaction for orders, and managing the budget (P/L) and operations for the first eBay resale group
- Managing and providing collaborative leadership for all operations/IT issues (24/7/365) and projects by working collaboratively with multiple IT, sales, and accounting teams
- Creating and participating in project “post mortems” and feedback loop reporting to continually learn and improve project team execution

Ernst and Young (Cap Gemini Ernst & Young) Consulting

Relevant Key Requirements: Project Management, Financial and Personnel Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

Ernst and Young (Cap Gemini Ernst & Young) was one of the largest professional services firms in the world and was widely recognized as the premier health care consulting firm. In my role at Cap Gemini Ernst & Young (CGEY), I was widely sought after for multiple nation-wide engagements based on my successful project track record. My consulting engagements for CGEY focused on:

- Assessing and implementing improvement strategies for client processes
- Leading compliance analysis of processes involving business associates related to privacy regulations
- Leading government compliance analysis of information system valid values needing renovation
- Training staff and leading, motivating, and managing the work of client financial teams in adherence to project plan
- Identifying operational issues, analyzing the root cause, developing recommendations, communicating with project executives (internal) and client steering committees (external), and executing risk mitigation efforts and operational solutions
- Performing project management functions, including progress, budgetary, and profit/loss analysis
- Assisting with the development of policies and procedures for client financial departments
- Providing management consulting services to payor, provider, and PBM clients
- Conducting HIPAA remediation, revenue cycle, system testing, and operational process improvements
- Performing as project manager and serving in a leadership capacity throughout the project lifecycle
- Creating a team environment of collaboration and personal responsibility in order to successfully execute project goals
- Presenting project updates, recommendations, and deliverables to clients that included Fortune 500 companies in the health care industry

Southern Arizona Mental Health

Relevant Key Requirements: Project Management, Financial and Personnel Management, Medicaid/MMIS Experience, Procurement and Contract Management, Project Risk Analysis, Vendor Management, Relationship Building, Team Building

As a Title XIX provider, Southern Arizona Mental Health has a long history of providing behavioral health services and serving the most vulnerable members of the community. As the Operations Director, I was called on to oversee day-to-day operations and contracts as well as to provide support to cross-functional teams, including IT and Finance.

- Directed multiple teams, including facilities team, office support team, and IT operations team
- Corporate administration responsibilities included chairing the administrative management team and developing employee training plans
- Successfully developed and was subsequently responsible for internal relationships surrounding departmental budgets and external relationships, including all corporate business contracts, purchasing/procurement, operational logistics, business development, community partnerships, and customer service

Education

- B.S.B.A., Finance, University of Arizona, 1998
- M.B.A., Health Care Management, Regis University, 2006

Professional Organizations

- Arizona Medical Group Management Association (MGMA)
- Healthcare Financial Management Association (HFMA)
- Healthcare Information Management Systems Society (HIMSS)
- Arizona Health-e Connection, Member

References

Reference 1

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Reference 2

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Honey.Pivrotto@pima.gov

Tab 5 RFP Forms

3.2.5 Information to Include Behind Tab 5: RFP Forms.

The forms listed below are attachments to this RFP. Fully complete and return these forms behind Tab 3:

- Release of Information Form
- Primary Bidder Detail & Certification Form
- Subcontractor Disclosure Form (one for each proposed subcontractor)

Attachment A Release of Information

Attachment A: Release of Information

(Return this completed form behind Tab 3 of the Bid Proposal.)

William Larkin Consulting LLC hereby authorizes any person or entity, public or private, having any information concerning the bidder's background, including but not limited to its performance history regarding its prior rendering of services similar to those detailed in this RFP, to release such information to the Agency.

The bidder acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The bidder acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the Agency or may otherwise hurt its reputation or operations. The bidder is willing to take that risk. The bidder agrees to release all persons, entities, the Agency, and the State of Iowa from any liability whatsoever that may be incurred in releasing this information or using this information.

William Larkin Consulting, LLC

Printed Name of Organization

Signature of Authorized Representative

Date August 16, 2011

William Larkin

Printed Name

Attachment B Primary Bidder Detail Form & Certification

Attachment B: Primary Bidder Detail Form & Certification

(Return this completed form behind Tab 3 of the Proposal. If a section does not apply, label it "not applicable".)

Primary Contact Information (individual who can address issues re: this Bid Proposal)	
Name:	William Larkin Consulting, LLC
Address:	14388 East Geronimo Road Scottsdale, Arizona 85259
Tel:	480 776 9996
Fax:	480 451 4319
E-mail:	billlark@gmail.com

Primary Bidder Detail	
Business Legal Name ("Bidder"):	William Larkin Consulting, LLC
"Doing Business As" names, assumed names, or other operating names:	Not Applicable
Parent Corporation, if any:	Not Applicable
Form of Business Entity (i.e., corp., partnership, LLC, etc.):	LLC
State of Incorporation/organization:	Arizona
Primary Address:	14388 East Geronimo Road Scottsdale, Arizona 85259
Tel:	480 776 9996
Fax:	480 451 4319
Local Address (if any):	None
Addresses of Major Offices and other facilities that may contribute to performance under this RFP/Contract:	Not Applicable
Number of Employees:	1 (Staffing through Subcontracts/Associates 5)
Number of Years in Business:	2
Primary Focus of Business:	Health Care IT Consulting
Federal Tax ID:	3-----1
Bidder's Accounting Firm:	Hunter Hagen
If Bidder is currently registered to do business in Iowa, provide the Date of Registration:	Not Applicable
Do you plan on using subcontractors if awarded this Contract? {If "YES," submit a Subcontractor Disclosure Form for each proposed subcontractor.}	Yes

Request for Confidential Treatment (See Section 3.1)		
Location in Bid (Tab/Page)	Statutory Basis for Confidentiality	Description/Explanation
Tab 5 Attachment B	Includes personal data	Tax ID

Exceptions to RFP/Contract Language (See Section 3.1)

RFP Section and Page	Language to Which Bidder Takes Exception	Explanation and Proposed Replacement Language:	Cost Savings to the Agency if the Proposed Replacement Language is Accepted
None			

BID PROPOSAL CERTIFICATION

By signing below, Bidder certifies that:

- Bidder accepts and will comply with all Contract Terms and Conditions contained in the Sample Contract without change except as otherwise expressly stated in the Primary Bidder Detail Form & Certification.
- Bidder has reviewed the Additional Certifications, which are incorporated herein by reference, and by signing below represents that Bidder agrees to be bound by the obligations included therein.
- Bidder does not discriminate in its employment practices with regard to race, color, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or handicap;
- No cost or pricing information has been included in the Bidder's Technical Proposal;
- Bidder has received any amendments to this RFP issued by the Agency;
- Bidder either is currently registered to do business in Iowa or agrees to register if Bidder is awarded a Contract pursuant to this RFP;
- The person signing this Bid Proposal certifies that he/she is the person in the Bidder's organization responsible for, or authorized to make decisions regarding the prices quoted and he/she has not participated, and will not participate, in any action contrary to the anti-competitive agreements outlined above;
- Bidder specifically stipulates that the Bid Proposal is predicated upon the acceptance of all terms and conditions stated in the RFP and the Sample Contract without change except as otherwise expressly stated in the Primary Bidder Detail Form & Certification. Objections or responses shall not materially alter the RFP. All changes to proposed contract language, including deletions, additions, and substitutions of language, must be addressed in the Bid Proposal;
- Bidder certifies that the Bidder organization has sufficient personnel resources available to provide all services proposed by the Bid Proposal, and such resources will be available on the date the RFP states services are to begin. Bidder guarantees personnel proposed to provide services will be the personnel providing the services unless prior approval is received from the Agency to substitute staff;
- Bidder certifies that if the Bidder is awarded the contract and plans to utilize subcontractors at any point to perform any obligations under the contract, the Bidder will (1) notify the Agency in writing prior to use of the subcontractor, and (2) apply all restrictions, obligations, and responsibilities of the resulting contract between the Agency and contractor to the subcontractors through a subcontract. The contractor will remain responsible for all Deliverables provided under this contract.
- Bidder guarantees the availability of the services offered and that all Bid Proposal terms, including price, will remain firm until a contract has been executed for the services contemplated by this RFP or one year from the issuance of this RFP, whichever is earlier; and,
- Bidder certifies it is either a) registered or will become registered with the Iowa Department of Revenue to collect and remit Iowa sales and use taxes as required by Iowa Code chapter 423; or b) not a "retailer" of a "retailer maintaining a place of business in this state" as those terms are defined in Iowa Code subsections 423.1(42) & (43). The Bidder also acknowledges that the Agency may declare the bid void if the above certification is false. Bidders may register with the Department of Revenue online at: <http://www.state.ia.us/tax/business/business.html>.
- By signing below, I certify that I have the authority to bind the Bidder to the specific terms, conditions and technical specifications required in the Agency's Request for Proposals (RFP) and offered in the Bidder's Proposal. I understand that by submitting this Bid Proposal, the Bidder agrees to provide services described herein which meet or exceed the requirements of the Agency's RFP unless noted in the Bid Proposal and at the prices quoted by the Bidder. I certify that the contents of the Bid Proposal are true and accurate and that the Bidder has not made any knowingly false statements in the Bid Proposal.

Signature:	
Printed Name/Title:	William Larkin Manager
Date:	August 16, 2011

Attachment C Subcontractor Disclosure Form

MED-12-018
Project Director Services for the MMIS Implementation Project

Attachment C: Subcontractor Disclosure Form

*(Return this completed form behind Tab 3 of the Bid Proposal. Fully complete a form for **each** proposed subcontractor. If a section does not apply, label it "not applicable." If the bidder does not intend to use subcontractor(s), this form does not need to be returned.)*

Primary Bidder ("Primary Bidder"):	
Subcontractor Contact Information (individual who can address issues re: this RFP)	
Name:	Brent C. Bizik, MBA
Address:	2012 W. Calle De Sol, Phoenix, AZ 85085
Tel:	480.209.7007
Fax:	
E-mail:	bcbizik@cambiare.us

Subcontractor Detail	
Subcontractor Legal Name ("Subcontractor"):	Cambiare
"Doing Business As" names, assumed names, or other operating names:	N/A
Form of Business Entity (i.e., corp., partnership, LLC, etc.)	LLC
State of Incorporation/organization:	Arizona
Primary Address:	2402 E. Cheryl Drive, Suite C Phoenix, Arizona 85028
Tel:	480.209.7007
Fax:	
Local Address (if any):	
Addresses of Major Offices and other facilities that may contribute to performance under this RFP/Contract:	
Number of Employees:	2
Number of Years in Business:	2
Primary Focus of Business:	Healthcare IT Consulting
Federal Tax ID:	27-1648478
Subcontractor's Accounting Firm:	HSU Law, PLC
If Subcontractor is currently registered to do business in Iowa, provide the Date of Registration:	N/A
Percentage of Total Work to be performed by this Subcontractor pursuant to this RFP/Contract.	50%
General Scope of Work to be performed by this Subcontractor	
Deputy Project Director will provide project leadership and management.	
Detail the Subcontractor's qualifications for performing this scope of work	

MED-12-018

Project Director Services for the MMIS Implementation Project

Overview

Successful health care leader with an M.B.A. in Health Care Management and extensive project management experience overseeing, planning, implementing, and managing complex information technology (IT) projects. Known for organizational leadership skills and proven ability to successfully manage and coordinate projects, think strategically, provide expert employee motivation, utilize analytical thinking and excellent interpersonal/listening skills to work collaboratively with stakeholders, gain consensus, and build teams to deliver world-class solutions in regular, crisis management, and high-pressure situations.

Key Qualifications

- Extensive health care IT project management experience
- Expertise in managing IT projects and creating and implementing health technology solutions
- Leadership roles within Arizona's Medicaid Program, Arizona Health Care Cost Containment System (AHCCCS)
- Experience serving as a Medicaid health plan interim Chief Operating Officer (COO), overseeing complex health care IT transition projects, including the management of third-party (vendor) IT transition teams
- Thrive working in fast-paced environments and expertise prioritizing and communicating conflicting needs to meet tight deadlines
- Intuitive understanding of the importance of mission-critical tasks within a project and ability to work collaboratively to resolve and, as a last resort, escalate issues to steering committees or client management
- Experience serving as business lead and working effectively as team leader to logically approach complex issues across multiple teams
- Excellent interpersonal skills, conflict resolution skills, and team building skills that facilitate a positive culture and foster open communication among internal and external stakeholders and across multi-layered organizational departments
- Expert in all Microsoft Suite Tools (including MS Excel, MS PowerPoint, MS Word, and MS Project) and the utilization of enterprise project tools, such as MS SharePoint and Borland requirements management tool

By signing below, Subcontractor agrees to the following:

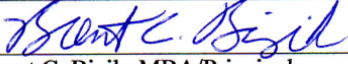
1. Subcontractor has reviewed the RFP, and Subcontractor agrees to perform the work indicated in this Bid Proposal if the Primary Bidder is selected as the winning bidder in this procurement.
2. Subcontractor has reviewed the Additional Certifications and by signing below confirms that the Certifications are true and accurate and Subcontractor will comply with all such Certifications.
3. Subcontractor agrees that it will register to do business in Iowa before performing any services pursuant to this contract, if required to do so by Iowa law.
4. Subcontractor does not discriminate in its employment practices with regard to race, color, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or handicap;

The person signing this Subcontractor Disclosure Form certifies that he/she is the person in the Subcontractor's organization responsible for or authorized to make decisions regarding the prices quoted and he/she has not participated, and will not participate, in any action contrary to the anti-competitive obligations agreements outlined above.

MED-12-018

Project Director Services for the MMIS Implementation Project

I hereby certify that the contents of the
Subcontractor Disclosure Form are true and accurate and that the Subcontractor has not made
any knowingly false statements in the Form.

Signature for Subcontractor:	
Printed Name/Title:	Brent C. Bizik, MBA/Principal
Date:	8/13/11

Tab 6 Bidder's Background

3.2.6 Information to Include Behind Tab 6: Bidder's Background.

3.2.6.1 Termination, Litigation, and Investigation.

Bid Proposals must indicate whether any of the following conditions have been applicable to the bidder, or a holding company, parent company, subsidiary, or intermediary company of the bidder during the past five (5) years. If any of the following conditions are applicable, then the bidder shall state the details of the occurrence. If none of these conditions is applicable to the bidder, the bidder shall so indicate.

William Larkin Consulting has never had a situation that has resulted in termination of any contract, or any litigation or investigation. The Table below provides a specific response for each bulleted item:

RFP Requirement	WLC Response
List any contract for services that the bidder has had that was terminated for convenience, non-performance, non-allocation of funds, or any other reason for which termination occurred before completion of all obligations under the contract provisions.	None
List any occurrences where the bidder has either been subject to default or has received notice of default or failure to perform on a contract. Provide full details related to the default or notice of default including the other party's name, address, and telephone number.	None
List any damages, penalties, disincentives assessed, or payments withheld, or anything of value traded or given up by the bidder under any of its existing or past contracts as it relates to services performed that are similar to the services contemplated by this RFP. Include the estimated cost of that incident to the bidder with the details of the occurrence.	None
List and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters related to the subject matter of the services sought in this RFP.	None
List any irregularities that have been discovered in any of the accounts maintained by the bidder on behalf of others. Describe the circumstances of irregularities or variances and detail how the issues were resolved.	None
List any details of whether the bidder or any owners, officers, primary partners, staff providing services or any owners, officers, primary partners, or staff providing services of any subcontractor who may be involved with providing the services sought in this RFP, have ever had a founded child or dependent adult abuse report, or been convicted of a felony.	None

WLC acknowledges that this is a continuing requirement. WLC will provide a timely disclosure of any relevant manner within 30 days of conviction.

